END DAY COMMENTARY

22th JULY 2026

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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	77,470.11	77,384.95	77,384.95	76,641.19	76,755.05	-715.06	-0.92
NIFTY	24,187.70	24,150.45	24,166.30	23,961.40	23,996.25	-191.45	-0.79

BOURSES IN RED AMID ESCALATING WEST ASIA TENSIONS

The 30-share BSE Sensex was down by 715.06 points or 0.92% to settle at 76,755.05 and the Nifty was down by 191.45 points or 0.79% to settle at 23,996.25. The BSE Small Cap 250 was down by 1.39% and BSE 500 was down by 0.88%. On the sectoral front, FMCG was gaining index. On the flip side, Realty, Healthcare, Auto, Metal, Consumer Durables, Capital Goods, Oil & Gas, IT and Banks were losing indices. Hindustan Unilever, NTPC, Powergrid, Titan and Bharti Airtel were gainers on the Sensex; on the flip side, Indigo, Infosys, SBIN, Ultratech Cement and ICICI Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a positive note and European indices are trading on a green note.

MARKET STATS (NSE)

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
BAJAJ-AUTO	11,019	10,403	5.92
NESTLEIND	1,500.0	1,451.9	3.31
TATACONSUM	1,097.0	1,081.5	1.43
ETERNAL	289.50	286.60	1.01
POWERGRID	289.00	286.70	0.80

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
INDIGO	5,115.0	5,305.0	-3.58
DRREDDY	1,179.9	1,206.0	-2.16
JIOFIN	234.89	240.03	-2.14
INFY	1,052.0	1,073.5	-2.00
AXISBANK	1,233.5	1,258.2	-1.96

Most Active (by value)

Name	Qty	Pr.	Value CR
ETERNAL	65944414	289.50	1,877.90
HDFCBANK	23385446	753.90	1,762.21
BAJAJ-AUTO	1448948	11,019	1,568.15
RELIANCE	10840383	1,284.0	1,399.49
BHARTIARTL	6589708	1,948.0	1,282.45

Most Active (by volume)

Name	Qty	Pr.	Value CR
ETERNAL	65944414	289.50	1,877.9
HDFCBANK	23385446	753.90	1,762.2
JIOFIN	17633281	234.89	416.25
TATASTEEL	16643117	185.99	309.79
ITC	12995017	280.80	364.33

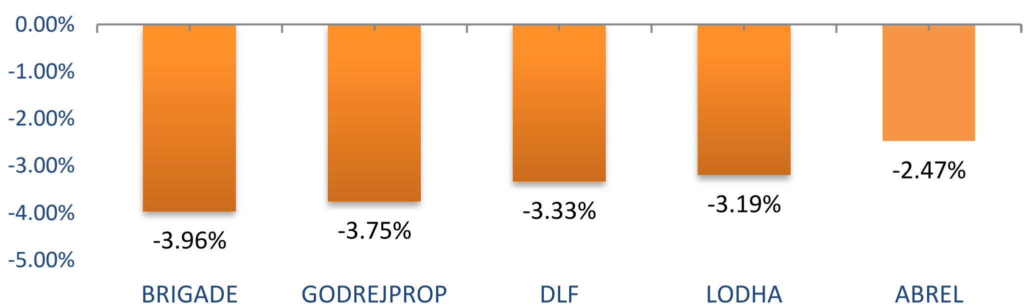
Indian equity benchmarks ended lower on Wednesday, led by heavy selling in pharmaceutical stocks after US President Donald Trump proposed tariffs of up to 200% on generic drug imports into the United States. Sentiments were further dampened by escalating West Asia tensions, which heightened concerns over potential supply disruptions. Markets made a negative start and extended losses throughout the session, amid broad-based selling across sectors. Investors also remained cautious ahead of key corporate earnings announcements due later this week. Traders took a note of Finance Minister Nirmala Sitharaman's statement that the rupee's value against the US dollar is market-determined and there is no target or specific band for the domestic currency. Traders overlooked World Trade Organisation (WTO) report stated that India is aiming to increase its share of global merchandise exports from about 1.8 per cent in 2024 to around 10 per cent by 2047.

On the global front, European markets were trading in green, after data showed that UK consumer price inflation slowed in June to its lowest level since March last year. Asian markets closed mixed, after Japan posted a merchandise trade deficit of 406.906 billion yen in June. That missed forecasts for a shortfall of 120.0 billion yen following the 391.8 billion yen deficit in May.
Source- AceEquity

NEWS BULLETIN

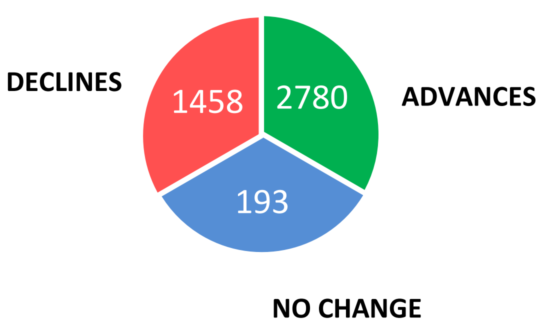
- **Adani Power** has reported 31.62% rise in its net profit at Rs 4,105.43 crore for the quarter ended June 30, 2026 as compared to Rs 3,119.26 crore for the same quarter in the previous year. The total income of the company has increased by 26.09% at Rs 16,427.03 crore for Q1FY27 as compared to Rs 13,027.82 crore for the corresponding quarter previous year.
- **JSW Infrastructure** has reported 3.04% rise in its net profit at Rs 75.17 crore for first quarter ended June 30, 2027 (Q1FY27) as compared to Rs 72.95 crore for the same quarter in the previous year.
- **Nestle India** has reported 47.92% rise in its net profit at Rs 975.12 crore for first quarter ended June 30, 2027 (Q1FY27) as compared to Rs 659.23 crore for the same quarter in the previous year.

MARKET DRIVING SECTOR : REALTY



S&P BSE: REALTY
CLOSING: 7,045.57
CHANGE: - 189.76
CHANGE: - 2.62%

MARKET BREADTH – NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.84

PE MULTIPLE OF NIFTY
20.49

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